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Consumer Insights Tracker: Chapter 1 Executive Summary

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The purpose of the Food Standards Agency's (FSA) Consumer Insights Tracker is to provide frequent monitoring of consumer behaviour and attitudes towards food insecurity, food availability, consumer concerns in relation to food, confidence in the food supply chain and confidence in the FSA. This annual report presents key findings and commentary on data from March 2022 to March 2023, and includes additional analysis of demographic groups of particular interest for the FSA and its audiences on certain measures.

Previous publications can be found on the FSA's website (The Covid-19 consumer research report, Consumer Insights Tracker report November 2021, Consumer Insights Tracker December 2021 to March 2022, COVID-19 tracker report) and full datasets for each wave are also available via the FSA data catalogue.

1.1 Context

Food prices in the UK rose sharply over the course of 2022. One major factor behind the high levels of food inflation has been the rising cost of energy. According to the Office for National Statistics, electricity prices in the UK rose by 67% and gas prices by 130% between March 2022 to March 2023. This had an indirect effect on the price of food and services, causing the cost of living to rise. The impact of high energy prices resulted in reported behaviour changes over winter, with 53% of adults in Great Britain saying they used less fuel in their homes because of the rising cost of living.

The conflict in Ukraine, which began in February 2022, has added to food supply chain pressures. A specific example of this was shipments of sunflower oil being interrupted, resulting in supermarkets introducing restrictions on purchases of cooking oil in April 2022. It has also contributed to a shortage of eggs as Ukraine and Russia are major producers of wheat – a key ingredient in chicken feed. Further, the conflict led to a rise in the cost of fertilisers and limited supplies, adding to supply chain pressures and impacting on food prices.

Between July to November 2022, the UK experienced significant economic and political change against a backdrop of the rising cost of living. This included the introduction of significant government support for millions of households. On 1 October 2022, the government introduced an Energy Price Guarantee (EPG) which was designed to cap the unit costs and standing charges for gas and electricity. Between October 2022 and March 2023, households received

£400 through the Energy Bills Support Scheme (EBSS). In addition, millions of households received financial support through the government's cost of living support package (for example, £150 reduction in Council Tax) and Cost of Living Payments made in July 2022 and November 2022 to eligible households in receipt of specific benefits or tax credits.

1.2 Key findings

Food affordability and food prices

Over a third of participants (35%) were worried about food affordability in March 2023. This is significantly higher than the year before (31% in March 2022), and in September 2022 the figure rose to 40%, the highest level since the tracker began in April 2020 (28%).

Demographic data also shows that there are several groups who are significantly more likely to be worried about food affordability in March 2023 than they were a year ago in March 2022:

- people from households with no children present (30% in March 2023 versus 25% in March 2022)
- younger people aged 25-34 (50% in March 2023 versus 42% in March 2022)
- male participants (34% in March 2023 vs. 29% in March 2022)
- people in work (36% in March 2022 vs. 32% in March 2022) and not in work (34% in March 2023 versus 29% in March 2022).

In March 2023, three quarters of participants (76%) reported that their food shopping had 'got more expensive'. This remains unchanged compared to March 2022 (74%), however, the figure peaked at 80% in June 2022.

Food insecurity

Over the course of the year, many of the measures of food insecurity included in the survey have seen an increase, reaching a high in the autumn of 2022. Since then, there has been a significant decline, although figures are still higher than those reported in March 2022.

More than a quarter of participants (27%) reported cutting down the size of their meals or skipping meals because they could not afford to buy food in March 2023, a significant increase from the year before (22% in March 2022). The proportion of participants taking this action was highest in June 2022 and October 2022 (both 31%).

In March 2023, 13% of participants reported using a food bank or food charity in the last month. Reported usage has risen steadily over time from 8% when tracking began in April 2020, to 15% in March 2022 and 17% in September 2022. In November 2022 reported usage decreased to 11%, rising to 15% in December 2022 but since the end of 2022 the figure has stabilised.

Demographic analysis of March 2023 data indicates that the following groups are significantly more likely to report certain indicators of food insecurity.

- people from households with at least one child present compared to households with no children present
- those from single person and larger households (3+) compared to 2 person households
- younger people (16-24-year-olds and 25-34-year-olds) compared to older people (55-75-year-olds)
- people in work compared to those not in work
- people with a health condition compared to those without a health condition

Since September 2022, the Consumer Insights Tracker has collected data on several new food insecurity measures (described below). Many of the figures peaked in autumn 2022 and since then have either declined or stabilised.

In March 2023:

- a quarter (26%) reported not being able to afford their essential food shopping. This has remained relatively stable since the question was first asked in September 2022.
- more than a quarter (28%) reported eating food past its use-by-date because they could not afford to buy more food, a significant decline from its peak in October 2022 when a third (33%) reported this behaviour.
- more than three in ten (32%) could not afford to eat a healthy balanced diet meal. The proportion reporting this was highest in October 2022 (36%) but since then has significantly declined and has remained at around three in ten between November 2022 and March 2023.
- in March 2023, one in five (20%) reported eating cold food because they could not afford to cook hot food. The proportion reporting this action has gradually declined since the question was first asked in September 2022 (25%) and is now significantly lower at 20%.

From September 2022, the Consumer Insights Tracker has included measures that track behaviours adopted by consumers to reduce energy bills and save money. In March 2023:

- over six in ten (63%) reported using cheaper cooking methods (such as using a microwave, air fryer or slow cooker) to reduce energy bills and save money. The proportion taking this action peaked at 67% in October 2022 but fell to 58% in November 2022 and, since December 2022, the figure has stabilised around this level.
- around a quarter (26%) said they have reduced the length of time they cook their food for. The proportion taking this action was at its highest in October 2022 (30%).
- a quarter (25%) had lowered the cooking temperature of food. This figure also declined significantly from a high of 29% in October 2022.
- around a fifth had changed the settings on their fridge and/or freezer so that food in a fridge and/or freezer is being kept at a warmer temperature (22%) – this figure has declined from September 2022 (27%) when tracking began.
- over one in ten turned off the fridge or freezer that contains food (14%) – this figure declined from September and October 2022 (18%)

Across these new measures related to food insecurity and consumer behaviours, there were several groups who were significantly more likely to be impacted than others:

- households with at least one child present compared to households with no children present
- those from single person and larger households (3+) compared to 2 person households
- younger people (16-24-year-olds and 25-34-year-olds) compared to older people (55-75-year-olds)
- people in work compared to those not in work
- people with a health condition compared to those without a health condition

In March 2023, three in ten (30%) said they had cut down the size of their meals or skipped meals because they were not well enough to shop or cook food. This figure has remained broadly stable since April 2022.

One in five (22%) said they cut down the size of their meals or skipped meals because they had no means to get to the shop to buy food, significantly higher compared to March 2022 (18%). The proportion of participants taking this action peaked at 27% in October 2022, falling to 20% in November 2022 when it stabilised.

Concerns around Christmas and New Year

In December 2022, over three quarters (77%) had taken action to save money at Christmas. The most common actions were: swapping to cheaper brands (36%); shopping in multiple stores to get a better deal (36%); buying less food than usual for Christmas (35%); and buying yellow sticker items (29%).

Compared to 2021, concerns about the price of food in the run up to Christmas and the New Year rose significantly, with eight in ten (82%) reporting concern in December 2022 (63% in December 2021). Participants were also more concerned about food availability in 2022 (56% in December 2022 vs. 44% in December 2021).

Concerns about the ‘quality of food’ (50% in December 2022 vs. 35% in December 2021) and the ‘safety of food’ (43% in December 2022 vs. 32% in December 2021) for Christmas and New Year also rose significantly in December 2022 compared to the same month the year before.

In December 2022 (not asked in December 2021), half of participants were concerned about the ‘healthiness of food’ (51%) and the ‘sustainability of food’ (50%) in relation to Christmas.

Food availability

Reported concern about food availability has remained broadly stable over the past 12 months - on average a third (34%) of participants worried about this issue – in line with March 2023 (36%). Concern reached a peak of 41% in October 2022, however this declined significantly in November 2022 (33%).

In March 2023, two thirds (65%) reported experiencing unavailable food items. This is the highest figure recorded since the Consumer Insights Tracker began in November 2021, and is also significantly higher compared to March 2022 (46%). In March 2023, the most common items that consumers reported as ‘unavailable’ were:

- fresh vegetables (36%), vs. 12-month average (20%)
- eggs (35%), vs. 12-month average (21%) - one of the most commonly unavailable items since December 2022
- fresh fruit (24%), vs. 12-month average (18%)
- fresh milk (16%), vs. 12-month average (17%)
- bread (16%), vs. 12-month average (18%)

Frozen foods were one of the top five most common items reported as being unavailable in most waves over the last 12 months.

Most ‘over-purchasing’ or ‘stockpiling’ behaviours related to food increased between March 2022 and October 2022 (when they were at their highest), and after falling, they have remained broadly stable from November 2022 until March 2023. Conversely, the proportion of people ‘purchasing more fuel than we usually would’ has declined (8% in March 2023 vs. 16% in March 2022).

Concerns about the food industry

Over the past 12 months, out of the issues covered in the survey, ‘food prices’ have consistently been the top concern for participants. A large majority are concerned about food prices (86% in March 2023), and this has risen significantly from already high levels in March 2022 (81%), reaching a peak in June 2022 (87%).

Concerns about food availability or food shortages are not as common as concerns about food prices, but they have risen steadily since March 2022 (55% compared to 63% in March 2023). Concern in March 2023 is also significantly higher than the 12-month average (59%).

Other concerns monitored in the Consumer Insights Tracker are also significantly higher in March 2023 compared to March 2022:

- sustainability / the impact of food production on the environment (60% vs. 56% March 2022)
- the 'healthiness' of food in my diet (57% vs. 52% March 2022)

Concerns reported about animal welfare in the food industry have remained stable over the past 12 months, with March 2023 in line with the same month the year before (60% vs. 57% March 2022).

Two in five (42%) reported concern about the quality of food produced in the UK in March 2023, a figure that has risen steadily since March 2022 (36%). Significantly more people reported concern about the quality of food imported from outside the UK (52%) although this has remained broadly stable over the past 12 months (50% in March 2022).

In March 2023, more than half (53%) were concerned about the safety of food imported from outside the UK, significantly higher than the levels of concern about food produced inside the UK (38%). The trend over time for these measures is broadly stable, with some fluctuations visible in concerns relating to imported foods.

Confidence in the food supply chain

Overall confidence in the food supply chain is now at its lowest level since tracking began, from 69% in November 2021 to 63% in March 2023. Since May 2022 this figure has remained stable ranging between 65% and 63%.

More specifically, there has been a decline in confidence that the food supply chain in the UK ensures that there are affordable food options for everyone, falling from 56% in March 2022 to 49% in March 2023. This measure has remained stable between May and March 2023.

In March 2023, more than three quarters of participants (78%) were confident that those involved in the food supply chain in the UK ensure that food is safe to eat. These figures have remained stable over the past 12 months (79% March 2022). Seven in ten (70%) were confident that food is of a high quality in March 2023, significantly lower than March 2022 (75%), although this figure has remained stable since May 2022 (71%).

Perceptions of the FSA

Since March 2022, there has been a decline in the proportion of participants stating that they trust the FSA to do its job. The figure for March 2023 (59%) is significantly lower than it was in March 2022 (63%) but has remained stable between June 2022 (60%) and March 2023.

Confidence in the FSA to protect the public from food-related risks has also declined significantly over time, from 75% in March 2022 to 72% in March 2023.

There have been no significant changes since March 2022 across other measures and most people continue to feel confident that the FSA:

- is committed to communicating openly with the public about food-related risks (68% March 2023 vs. 69% in March 2022)
- takes appropriate action if a food-related risk is identified (76% in March 2023 and 2022)